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Yearbook 2013

The Quality of the Media

Digest: mainfindings

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Yearbook 2013: The Quality of the Media – Switzerland

What is the purpose of the Yearbook?

The aim of the Yearbook is to deepen the debate about the quality of the media and to help improve it. It will be a resource for people working in the media, those involved in politics, business or academia and anyone with an interest in media trends and media contents. The Yearbook is based on the long-held view that the quality of democracy depends on the quality of the information communicated to the public by the media. The Yearbook will provide the public with a benchmark for the kind of journalism they wish to be exposed to, the media makers will have a benchmark for the kind of journalism they want to produce and be responsible for, and politicians will gain a feel for how the media world is developing and for the resources available for information-based journalism in Switzerland.

How is quality to be understood?

The Yearbook is oriented towards what information-based journalism itself understands by quality. This understanding can be traced back to enlightened liberalism and has expressed itself subsequently in claims to universality, relevance, balance and a pursuit of objectivity in public discourse.
These claims are reflected in the modern quality standards of "diversity" and "relevance", the related concept of "topicality" and in the key requirements in terms of the "professionalism" of journalistic work (rationality, editorial input, transparency of sources). They are also reflected in the statutory regulations regarding public communication, particularly the requirements applicable to public broadcasters, in the general principles pertaining to journalism, in editorial guidelines, in the articles of association of media councils, in the expectations of the public and in the quality analyses provided by those working in the social sciences.

What is new in this year's Yearbook?

The Yearbook 2013 has been somewhat slimmed down, with the in-depth studies previously published as part of the Yearbook being made available for purchase as separate electronic publications (www.schwabeverlag.ch / www.foeg.uzh.ch). From now on, the printed Yearbook will consist of the main findings and the systematic annual observation of the Swiss media arena covering all forms of information media (press, radio, TV and online).

Who is responsible for the Yearbook?

The Yearbook is produced and published by the fög – the Centre for Research on the Public Sphere and Society at the University of Zurich (www.foeg.uzh.ch). The following authors have contributed to the Yearbook 2013: Urs Christen, Mark Eisenegger, Patrik Ettinger, Angelo Gisler, Susanne Gedamke, Lucie Hauser, Florent Heyworth, Kurt Imhof, Otfried Jarren (guest writer), Esther Kamber, Jens Lucht, Mario Schranz, Linards Udris.

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1. Quality of the Media Yearbook 2013 – a summary of the key points

Compared with the situation at the start of the new millennium, the picture in 2012 is one of fundamentally altered media arenas in the various linguistic regions, characterised by downwards stratification. The base section associated with low-quality information media has broadened out, the top sections associated with high-quality offerings are eroding and the segment associated with medium-quality information media is also crumbling. For the years 2010, 2011 and 2012, a detailed record has been made of the media outlets on the rise or on the decline according to the quality analysis (1.1).

Key factors in this structural change in the information media in Switzerland are the concentration of financial and journalistic resources, the loss of revenue experienced by the daily and Sunday press, the loss of diversity suffered by the subscription papers, the territorial distribution in terms of sales, and the expansion of practices where local editions share content with the national edition. As far as the news sites are concerned, the diversity of outlets for offerings where circulation is comparable with the press is much smaller than for print. In fact, it is precisely the online sector that does not provide new opportunities for every media company (1.2).

2012 was a bad year in terms of finance for information-based journalism. The information-based press made CHF 183 million less in advertising revenue than the previous year, while the figures available for the news sites indicate a first ever fall in revenue for display advertising. Public television also lost advertising revenue, whereas both search engines with no journalistic content and advertising slots of foreign private television providers with no real value from a journalistic perspective enjoyed growth. Even the providers of online classified advertisements owned by media companies are earning money, although the willingness to finance journalism through its second oldest form of income, namely advertising, is declining within media companies, where journalism is being supplemented by other lines of business as they become ever more diversified (1.3).

Validating the quality of the information media in Switzerland reveals that less does not mean more. The provision of context – the ultimate aim of and against the news business in its purest form – has declined by an average of 7% since 2010 across the various media types, with free online sites showing the biggest reduction in quality, followed closely by free printed content. It seems the decline associated with the free online sites can be attributed to a planned paywall at *tagesanzeiger.ch* (2.1).

The world presented by the media in 2012, at least in terms of the high-quality information media, was one of war and crisis and a Switzerland at odds over its bilateral problems and lacking even a strong conceptual framework. As far as the low-quality information media are concerned, the world beyond Switzerland mainly consisted of sport, followed by war. The tax agreement between Germany and Switzerland was the dominant bilateral issue and, both as regards "domestic policy" and in absolute terms, young, scantily clad starlets were the order of the day, followed by the Hildebrand affair (2.2).

The core findings of the first in-depth study, which examines the structural change within the media internationally since the 1960s, show that Switzerland is not alone in these respects. Switzerland did, however, complete its commercialisation of the media somewhat more quickly. The last part takes a look at the in-depth study on how journalists use Twitter. Can we talk about a social species (3)?

1.1 Downwards stratification and fall in quality within the Swiss media arena – changes in usage and offerings between 2001 and 2012

A good starting point would be an overview of how information-based journalism has developed since the start of the new millennium: the advent of a "free culture" providing news offline and then online and the onset of faster upheaval within the media as a result of the Internet and during the global financial crisis. A

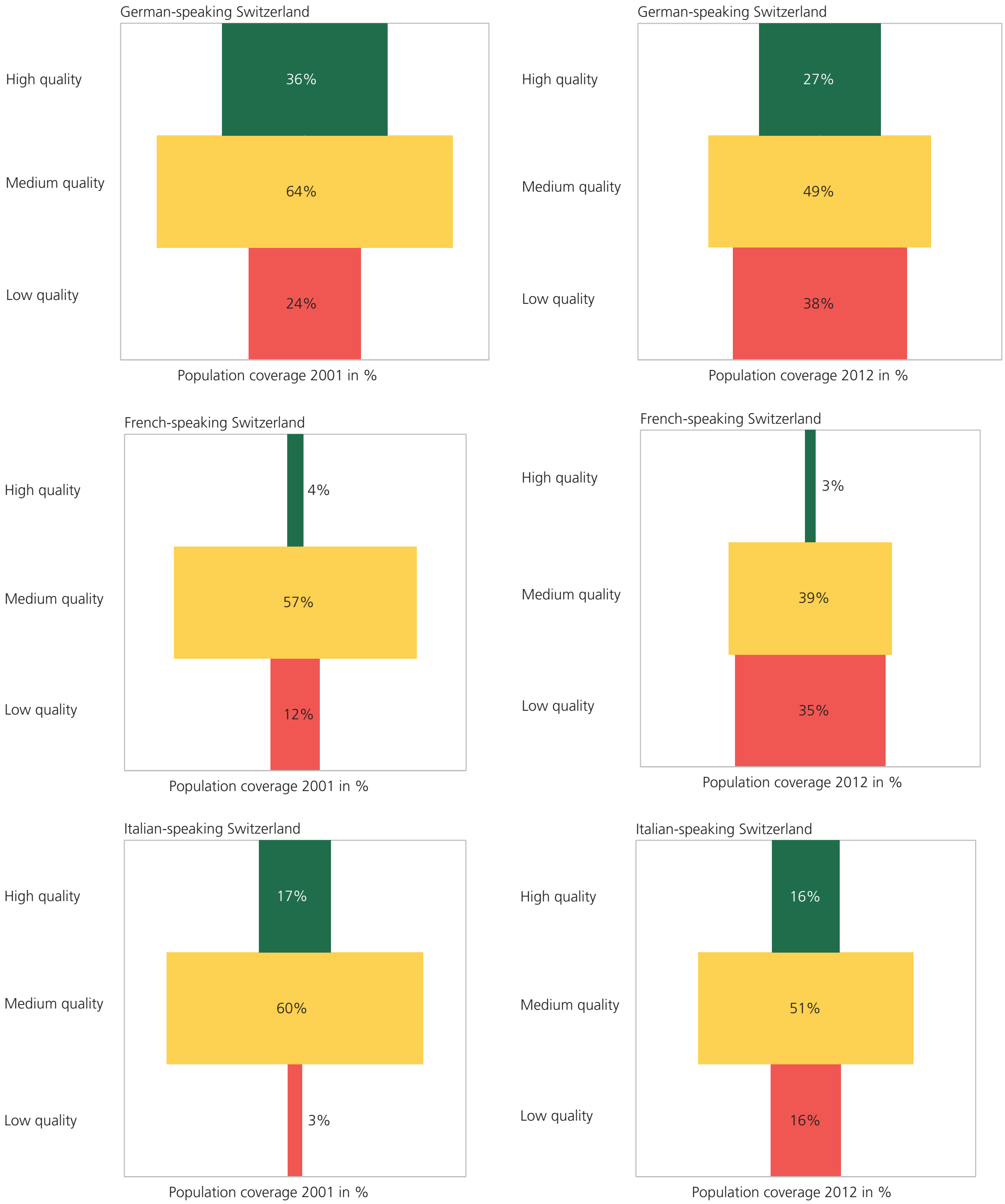

Diagram 1: Quality pyramids

The diagram shows how the aggregate population coverage by the relevant low-, medium- and high-quality media outlets (>0.5% coverage of the population in the linguistic region) has changed between 2001 and 2012, broken down by individual linguistic regions. Data set used for quality classification: All news stories from the analysis of front pages and lead stories that were sourced on the basis of a random sample during 2012 (n = 15,570; data sources for usage figures: WEMF, NET-Metrix, Mediapulse; see diagram 2).

Interpretation example: In French-speaking Switzerland low-quality media outlets were reaching 12% of the population in 2001. Ten years later media outlets of a similarly low quality were already covering 35% of the population.

comparison of the quality pyramids (see the "Quality pyramid" box) for information-based journalism within the three major linguistic regions of Switzerland for the years 2001 and 2012 points to a downwards stratification in the Swiss media arena (see diagram 1). The quality pyramids show that, between 2001 and 2012 in the three major linguistic regions, the outlets that suffered a decrease in circulation and usage are those which offer good and medium-quality information-based journalism, while the base of the pyramid with its low-quality offerings has grown massively. Since the start of the new millennium, there has been erosion at both the top sections (interregional subscription press, information-based programmes from public broadcasters) and the middle segments (regional subscription papers, news sites, offerings from public broadcasters and some information-based programmes from private broadcasters). By contrast, the low-quality base of the pyramid has benefited. This is made up of free and tabloid media, both online and offline, other news sites, one subscription paper, and most of the information offerings from private broadcasters (see diagram 2). Of the eight news sites to be added up to 2012 as a result of the increase in usage, only two are achieving medium quality levels (*nzz.ch* and *tagesanzeiger.ch*), while the other news sites are helping to broaden the base of the pyramid. Above all else, the usage levels for free newspapers are growing. They have already become the press outlets with the highest circulation in their linguistic regions, with *20 minuti* well on the way to doing so in Italian-speaking Switzerland. The overall result – particularly when combined with the ongoing increase in usage for the news sites of the tabloid and free papers – is a downwards stratification of the Swiss media arena enlarging the base of the pyramid.

Quality pyramid – media quality and population coverage

The quality pyramid is a vertical classification within three groups of all the 47 media outlets whose quality has been validated based on low (red), medium (yellow) and high (green) quality. The horizontal distance covered by the segments corresponds to the cumulative population coverage from the year 2001 or 2012 of the media outlets associated with the respective quality segments within the linguistic regions.
The 47 media outlets included constitute a sample based on a representative selection, which was made following a two-step process. First, all the media outlets with a universal, general and current information offering (general interest) and whose circulation or usage covers at least 0.5% of the resident population aged 15 or over in the linguistic region concerned were recorded for each linguistic region (see the "Media structures in Switzerland" box). Second, the number of outlets for each media type is reduced proportionately – to keep the cost of research down – across all linguistic regions, so that each media type is represented (see fög 2013, Appendix 1: "Methodology", section 1.2.4). In French-speaking Switzerland no private television outlet covers 0.5%. *Léman Bleu* was included, however, in order to take this type into account. For the pyramids for 2001, all information outlets from 2010 to 2012 which already had a wide circulation in 2001 were included.
The basic sample for the quality pyramid is made up of the 47 biggest media outlets from the print, broadcasting and online forms whose front pages or lead stories are validated in terms of the relevance, diversity, professionalism (here: rationality) and topicality (here: provision of context) quality indicators (see fög 2013, "Preamble"). All four quality indicators are used in quality scoring and for establishing the quality segments. Here, the quality score scale for each year under investigation is summarised into three groups, with the highest segment covering the "very good" and "good" outlets, the middle segment the "medium-quality" ones and the bottom segment the outlets associated with "low" and "very low" quality. The information outlets can thus move up and down within and between the quality segments when comparing different years.

This downwards stratification of the media is most pronounced in French-speaking Switzerland, followed by German- and Italian-speaking Switzerland. Based on a comparison of the media arenas in the three major linguistic regions, French-speaking Switzerland is associated with the lowest quality, particularly because the segment associated with high quality *(Le Temps)* is very narrow. In French-speaking Switzerland, the medium-quality segment shrank from 57% to 39% between 2001 and 2012, while the base of the pyramid widened from 12% to 35%. The media arena in French-speaking Switzerland, which during the same

German-speaking Switzerland

1	Echo der Zeit
2	Rendez-vous
3	Neue Zürcher Zeitung
4	Tages-Anzeiger
5	NZZ am Sonntag
6	Aargauer Zeitung
7	10vor10
8	Der Sonntag
9	Die Südostschweiz
10	Neue Luzerner Zeitung
11	Tagesschau
12	nzz.ch
13	Basler Zeitung
14	News: Radio 24
15	Weltwoche
16	Berner Zeitung
17	Sonntags Zeitung
18	tagesanzeiger.ch
19	Nachrichten: Radio Argovia
20	20 Minuten
21	20minuten.ch
22	Aktuell: Tele M1
23	Blick
24	Züri News: Tele Züri
25	SonntagsBlick
26	Blick.ch

French-speaking Switzerland

1	Le Temps
2	RTS Un: Le Journal
3	Tribune de Genève
4	Journal: Léman Bleu
5	La 1ère: Le 12h30
6	Le Matin Dimanche
7	24 heures
8	24heures.ch
9	Tribune de Genève Online
10	Journal: Lausanne FM
11	Lematin.ch
12	Le Matin
13	20minutes.ch
14	20 minutes

Italian-speaking Switzerland

1	Rete Uno: Radiogiornale 12.30
2	Il Caffè
3	Corriere del Ticino
4	LA1 Telegiornale Sera
5	Ticino News: Tele Ticino
6	Radiogiornale: Radio 3i
7	20 minuti

Diagram 2: Quality scoring hierarchies based on outlets

The diagram shows quality scoring for 2012 based on the outlets for each linguistic region. The quality segment for each media outlet is also specified (low = red; medium = yellow; high = green). Data set used: All news stories from the analysis of front pages and lead stories that were sourced on the basis of a random sample during 2012 (n = 15,570).

Interpretation example: In German-speaking Switzerland, the highest quality scores were achieved by *Echo der Zeit, Rendez-vous, Neue Zürcher Zeitung, Tages-Anzeiger* and *NZZ am Sonntag*. All these belong to the segment associated with the highest quality.

period, but particularly since 2010, has seen the ownership profile shift, with companies from France and German-speaking Switzerland supplanting controlling parties from French-speaking Switzerland, most closely resembles a broad-based pyramid. That said, the selection does not include any subscription outlets from the remaining publishing houses in French-speaking Switzerland, which would boost the middle segment. At the base of the pyramid, the offline and online tabloid media alone reach 17% of the population, with offline and online free media making up 18% of the base of the pyramid, and this is the only linguistic region with a representative from the subscription press in the lowest-quality group (*24 heures* with 4.5% population coverage). *Le Temps*, which is also suffering from falling circulation, is the only media outlet in French-speaking Switzerland in the top section of the pyramid (2.6% coverage).

The pyramid for German-speaking Switzerland has a much broader top section of high-quality outlets (*Echo der Zeit, NZZ, NZZ am Sonntag, Rendez-vous* and *Tages-Anzeiger*). In 2012, 27% (2001: 36%) of the population were still being reached by these outlets. The intermediate segment associated with medium quality has also been broader in the media arena in German-speaking Switzerland than in French-speaking Switzerland since 2001, despite losses. It has shrunk from 64% to 49%, while the segment at the low-quality base has expanded from 24% to 38% in German-speaking Switzerland. Italian-speaking Switzerland still reflects a traditional picture of quality stratification, a relic from when the regional press was strong, with a broad segment of medium-quality media outlets. The successful launch of *20 minuti* in 2011 helped the low-quality segment in Italian-speaking Switzerland expand to 16% in 2012.

The erosion affecting the top of the pyramid and the middle segment is self-fulfilling, since losses in terms of usage and revenue are more pronounced at the top and in the middle segment of the quality pyramid and tend to lead to belt-tightening. The fall in usage is particularly marked in the case of the subscription papers, which are still associated with the broadest diversity of outlets (online, the diversity of press outlets is very restricted). This means that those media types which report on events from across Switzerland as a whole at a cantonal and local level, too, are being weakened. By contrast, the usage and revenue levels for outlets at the base of the pyramid – with the exception of the tabloids – are tending to grow.

This market shift towards low-quality (free) offerings at the expense of high- and medium-quality outlets is not only fuelling concentration but is also throwing up issues in terms of media policy. In a democracy – particularly one in a federal mould – information-based journalism is of systemic relevance from a political perspective. If there is trust in the system, citizens can manage without professional information-based journalism and make do with free news and/or tabloid offerings instead. They must, however, be able at any time to source information of sufficient quality once more about their wider community. During acute crises and catastrophes, there are often marked shifts in usage patterns, with people gravitating towards the established and trustworthy forms of media. Professional information-based journalism is essential for democracy and is therefore a common good. That said, its long-term survival in the market cannot be guaranteed against a background of a sustained fall in sales, desertion by advertisers to players outside the sector (search engines, software and telecommunication companies, social media and online classified advertisements) and the availability of free offerings. Three free outlets, namely *20 Minuten* and *20 minutes (Tamedia AG)* and *Blick am Abend (Ringier AG)*, siphoned off CHF 347 million during 2011, no less than 31% of the advertising volume (gross advertising revenue) from all 45 press outlets which cover at least 0.5% of the population of the linguistic region and for which advertising revenue figures are available. The 42 outlets from the subscription and tabloid press which people actually have to pay for thus have to fight over the remaining 69% slice of the advertising pie, with only the Sunday paper/magazine media type able to just maintain its share (see fög, 2012, p. 121f.). It is no consolation that a comparison of the downwards stratification of the media in Switzerland with that in Austria, the United Kingdom, Germany and France shows the same trend overall. Nonetheless, this process of downwards stratification is happening relatively fast in Switzerland (see the in-depth study entitled “Kommerzialisierung und Konzentration der Medien im internationalen Vergleich” [“An international comparison of media commercialisation and concentration”] and 1.6).

1.2 Concentration and losses of publishing/editorial capacity and outlets within information-based journalism

The losses in terms of usage and revenue for the subscription paper media type (see 1.4) suggest that this cornerstone of the press form is under the most pressure as a result of the economic and technological transformation and changes in user behaviour as people become accustomed to free offerings. This explains why the subscription papers have experienced the biggest falls (see fög 2013, section I.1).

Media structures in Switzerland

To provide a representative picture of information-based journalism in Switzerland in terms of financial position and circulation, figures are recorded for all outlets with a universal, general and current information offering (general interest) whose circulation or usage covers at least 0.5% of the resident population aged 15 or over in the linguistic region. The coverage rate is determined from the cumulative population coverage of the various press outlets for each linguistic region and media form or type.

In 2012, the recording criteria of general interest and a population coverage of at least 0.5% were met by 148 information outlets. These can be broken down into 48 information-based programmes on the radio and 27 on television, 45 press outlets and 28 websites. These 148 information outlets belong to 35 different controlling parties.

In terms of the diversity of outlets and compared with 2001, seven outlets in German-speaking Switzerland as of 2012 no longer meet the recording criterion of population coverage of at least 0.5% in the linguistic region (*Basellandschaftliche Zeitung, Berner Oberländer, Solothurner Zeitung, Schaffhauser Nachrichten, Thuner Tagblatt, Bieler Tagblatt* and *Walliser Bote*). Across Switzerland as a whole, the last ten years have seen the number of subscription papers relevant for recording purposes fall by 26%, with overall circulation falling by 33% (see diagram 3). Although the subscription press may still in 2012 account for just under two-thirds of all press outlets relevant for recording purposes, this contraction means that these outlets combined now only make up a third of the overall circulation for all press outlets meeting the recording criterion.

By contrast, the trend for free papers (as well as the Sunday press) is very much moving in the opposite direction. Even after the battle among the free papers during 2009 led to something of a shakeout in the market, their overall circulation is still 40% higher than in 2001. While among the free papers regional (in linguistic terms) editorial teams are producing a total of four media outlets *(20 Minuten, 20 minutes, 20 minuti, Blick am Abend)* with a high circulation, the subscription papers with regional editorial teams are printing much smaller runs of their offerings and generating much less revenue, with the situation only getting worse. This

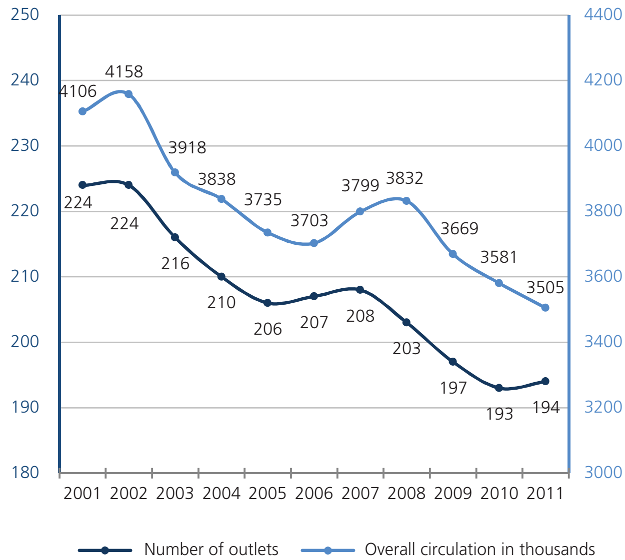

Diagram 3: Paid-for press in Switzerland – number of outlets and overall circulation 2001–2011

The diagram shows how the number of outlets and the overall circulation for press which people actually have to pay for have changed over the long term. All paid-for papers with universal content published at least weekly as a separate outlet were taken into account. This corresponds roughly to the daily and Sunday press, the regional weekly press and the popular press excluding free papers, official journals and special interest papers.

Interpretation example: The number of outlets fell to 197 in 2009. There were six fewer outlets than the previous year. At the same time, overall circulation declined from 3,832,000 (2008) to 3,669,000 in 2009 (source: Federal Statistical Office).

is leading to concentration in financial terms, to losses of outlets, to greater sharing of content between local and national editions, and to editorial bloodletting, the latter being more severe than the loss of outlets as a result of this sharing of content. These practices only further reduce content diversity and lead to an even narrower concentration of journalistic resources.

In terms of concentration, during the period between 2001 and 2012 six publishing houses in French-speaking Switzerland closed because their press outlets were no longer achieving wide enough circulation, were wound up, or were taken over by other media companies (see diagram 4). As already mentioned, this process saw the ownership profile in French-speaking Switzerland shift in favour of controlling parties from France and, particularly, from German-speaking Switzerland. In 2012, *Tamedia AG* controlled a significant 68% of the press market in French-speaking Switzer-

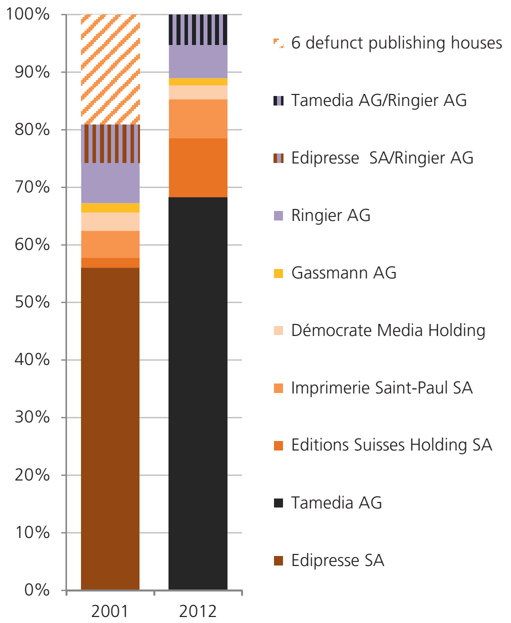

Diagram 4: French-speaking Switzerland – concentration within the press market

The diagram shows the level of concentration within the press market in French-speaking Switzerland based on a comparison between 2001 and 2012. The aggregate circulation figures for all the significant press outlets in French-speaking Switzerland make up the market as a whole. The respective share of the controlling parties determines their market position. All press outlets covering at least 0.5% of the population in the linguistic region are taken into account.

Interpretation example: Tamedia AG took over *Edipresse SA* in 2006 and increased the latter's original market share (56%) to 68% (source of circulation figures: WEMF).

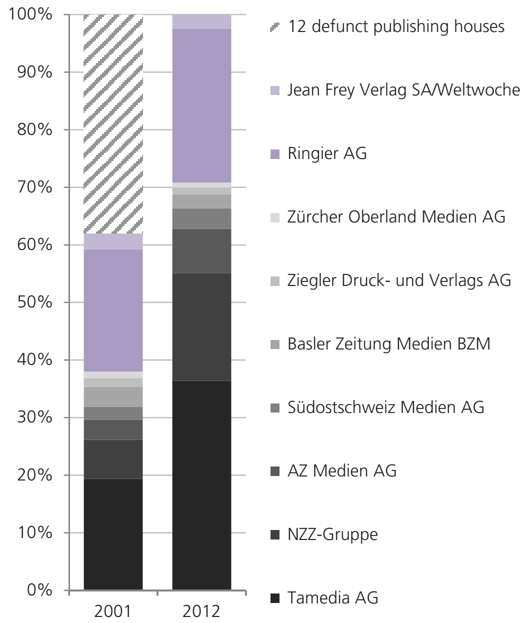

Diagram 5: German-speaking Switzerland – concentration within the press market

The diagram shows the level of concentration within the press market in German-speaking Switzerland based on a comparison between 2001 and 2012. The aggregate circulation figures for all the significant press outlets in German-speaking Switzerland make up the market as a whole. The respective share of the controlling parties determines their market position. All press outlets covering at least 0.5% of the population in the linguistic region are taken into account.

Interpretation example: Tamedia AG increased its market share in German-speaking Switzerland from 19% to 36% (source of circulation figures: WEMF).

land based on all outlets reaching at least 0.5% of the population in the linguistic region.

Concentration within media markets

The concentration within the markets associated with the press, radio, TV and online media forms is determined in two steps. First, a record is made for each market in the particular linguistic region of all information outlets with a wide circulation – at least 0.5% population coverage in German-speaking, French-speaking or Italian-speaking Switzerland – and their controlling parties. In German-speaking Switzerland, 58 information outlets meet this recording criterion, compared with 29 in French-speaking Switzerland and 24 in Italian-speaking Switzerland. Next, the overall circulation (press) or overall usage (other forms) is determined for each controlling party's information outlets and the percentage share of the overall circulation or usage in the relevant market is calculated for each controlling party.

In German-speaking Switzerland between 2001 and 2012, a dozen publishing houses lost their status as controlling parties of information outlets with a wide circulation: *Metropol, Schibsted, Media Punkt AG, Meier & Cie AG, Gassmann AG, Mengis AG, Lüdin AG, Vogt-Schild Medien AG, LZ Medien Holding AG, Espace Media Group, Berner Oberland Medien AG BOM, Familie Gut*. At the same time, the major media firms have been increasingly their market share considerably. Of

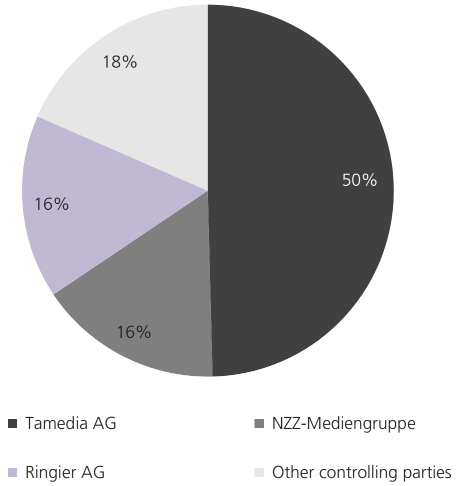

Diagram 6: Gross advertising revenue for the press market in German-speaking Switzerland

The diagram shows the respective share of gross advertising revenue for 2012 for the three largest controlling parties in press terms. All press outlets covering at least 0.5% of the population in the linguistic region are taken into account.

Interpretation example: Tamedia AG took a 50% slice of the advertising pie for German-speaking Switzerland in 2012.

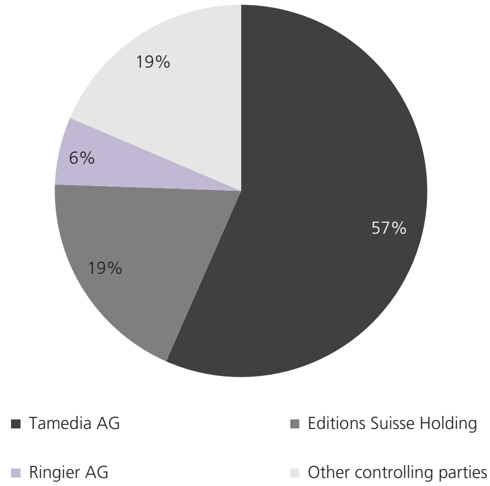

Diagram 7: Gross advertising revenue for the press market in French-speaking Switzerland

The diagram shows the respective share of gross advertising revenue for 2012 for the three largest controlling parties in press terms. All press outlets covering at least 0.5% of the population in the linguistic region are taken into account.

Interpretation example: Tamedia AG took a 57% slice of the advertising pie for French-speaking Switzerland in 2012.

the three oligopolists from 2012, the market share of *Tamedia AG* in German-speaking Switzerland grew from 19% to 36%, with *NZZ-Mediengruppe* increasing from 7% to 19% and *Ringier AG* from 21% to 27%. The next-ranked media companies dominating the market at a regional level are someway behind, despite enjoying increases between 2001 and 2012, namely *AZ Medien AG* (from 4% to 8%) and *Südostschweiz Mediengruppen AG* (from 2% to 4%; see diagram 5). *Südostschweiz Mediengruppen AG*, however, will experience a loss again for 2013 after transferring some papers to *NZZ-Mediengruppe.* This loss of diversity in terms of independent media companies is being accompanied in German-speaking Switzerland by a dividing-up of sales territories. For the controlling parties involved, this creates competition-free sales markets and is crucial to opening up advertising markets covering the entire area concerned.

Within these territories, the sharing of content between local and national editions led to an even narrower concentration both in financial terms and in terms of journalistic resources. It is possible to gauge potentially identical journalistic content by considering cumulative circulation for all outlets which cooperate on editorial resources: based on its press outlets which meet the recording criterion, *Tamedia AG* achieved an overall circulation of 340,000 for 2012. Once its various collaborations are taken into account, this overall circulation increases to 510,000. *NZZ-Mediengruppe's* rose from 280,000 to 370,000, while *AZ Medien AG* grew from 84,000 to 170,000. These three media companies themselves or their subsidiaries have either a majority or a minority shareholding in all the small media companies whose subscription papers cooperate at a journalistic level (apart from *Gassmann AG*: *Bieler Tagblatt*).

This process of concentration within the press market, which has happened rather quickly, also speaks of a press in crisis, with net advertising revenue for the daily and Sunday press as a whole falling by 18% between 2003 and 2011. The free press has not felt the impact of this at all (in terms of the gross revenue available), while the Sunday press has not been affected quite so badly, losing 6% in net advertising revenue during the period. In keeping with the process of concentration within the press market, the big controlling parties increased their share of the advertising pie for the press outlets with a wide circulation. Only gross figures are available: *Tamedia AG* accounted in 2012 for half (*Ringier AG* 16%, *NZZ-Mediengruppe* 16%) of the advertising pie in German-speaking Switzerland and 57% in French-speaking Switzerland (*Ringier AG* 6%, *Editions Suisse Holding SA* 19%; see diagrams 6 and 7).

The level of concentration is now also increasing in the significantly narrower online market. The major investment needed in information-based journalism online – against a background of insufficient money generated through display advertising (see 1.3) and tough competition from players outside the sector for this display advertising – can only really be provided by the major controlling parties from the world of print. Online free news is also offered by national and international players from outside the sector (search engines, social media, telecommunications and software providers). The central issue, however, is the competition for advertising revenue. Media companies with less power in the market than the big three *(Tamedia AG, Ringier AG, NZZ-Mediengruppe)* have little opportunity in German- and French-speaking Switzerland to gain a foothold within the online sector, i.e. to establish relevant news sites (see fög 2013, section I.1). Thus *AZ Medien AG* and Südostschweiz Mediengruppen AG are not yet in a position to carve out a position in the online market comparable to the one they enjoy in print. A need for high levels of investment, insufficient returns, strong competition from outside the sector and online-based network systems with a powerful position in the market are restricting the relevant news site offerings available on the Internet. For example, the online offering of *Basler Zeitung* is enjoying sufficient circulation to satisfy the recording criterion thanks to its integration within *Newsnet (Tamedia AG)*, while the online offering of *Aargauer Zeitung*, which has similar circulation, is excluded. On the whole, the online sector is not really providing new opportunities to all those involved in information-based journalism. Quite the opposite, in fact: although the various media forms are converging within the online sector, only a handful of providers are in a position to make the necessary investment. This is taking the process of concentration to a whole new level. Even now, the number of outlets relating to the information offerings relevant from a recording perspective (based on high usage) is 40% lower online than for the press.

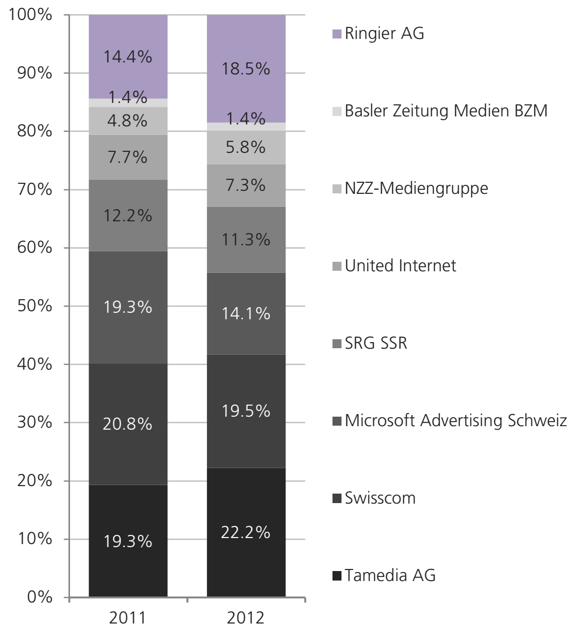

Diagram 8: German-speaking Switzerland – concentration within the online market

The diagram shows the level of concentration within the online market in German-speaking Switzerland based on a comparison between 2011 and 2012. The aggregate usage figures for all the significant information sites in German-speaking Switzerland make up the market as a whole. The respective share of the controlling parties determines their market position. All information-based sites covering at least 0.5% of the population in the linguistic region are taken into account (source: NET-Metrix usage figures).

Interpretation example: Tamedia AG increased its market share in German-speaking Switzerland from 19.3% to 22.5%.

Tamedia AG enjoyed the biggest increase in its online market share across the various linguistic regions. It attained a 23% share in German-speaking Switzerland, followed by Swisscom *(Bluewin.ch)* with 20% and *Ringier AG* with 17% (see diagram 8). In French-speaking Switzerland, *Tamedia AG's* online market share is as high as 31%, followed by *Microsoft Advertising Schweiz* (26%) and *Swisscom* (21%). All these players offer free news. These figures also show that the main competition for the publishers in the online sector is not so much the offering from *SRG SSR* as providers from outside the sector. An indicator of how people fleetingly "graze" on online information – including during working hours – is the dominance of the soft-news offerings from players outside the sector and the low-quality sites from the media companies. The online market position of *Ringier AG* in German-speak-

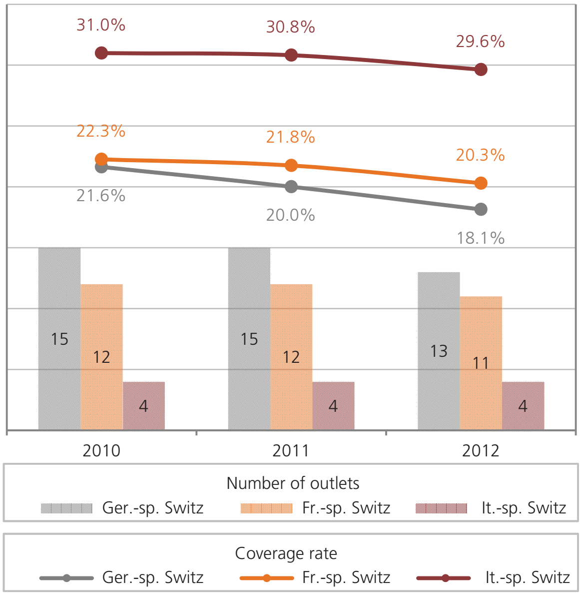

Diagram 9: Subscription press – coverage rate and number of outlets

The diagram shows the extent to which subscription press outlets covered the population between 2010 and 2012 within the three linguistic regions (lines) and how many outlets combined make up this coverage rate (columns). All information outlets covering at least 0.5% of the population in the linguistic region are taken into account.
Interpretation example: The coverage rate in Italian-speaking Switzerland fell from 31% to 29.6% between 2010 and 2012, while the number of information outlets remained unchanged at four.

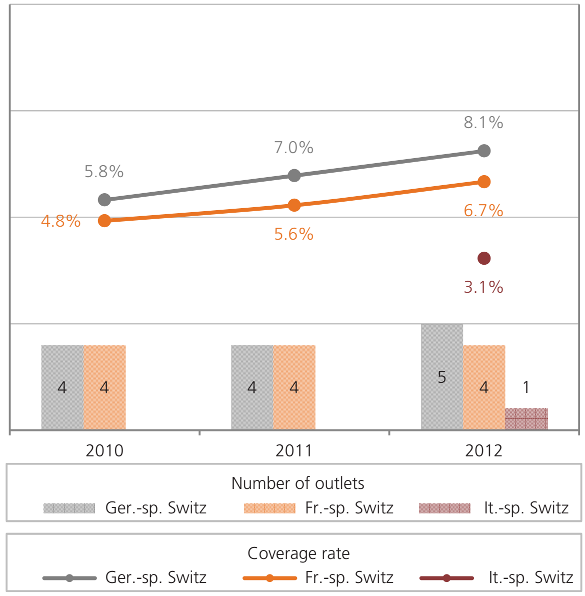

Diagram 10: Subscription online offerings – coverage rate and number of outlets

The diagram shows the extent to which subscription online news sites covered the population between 2010 and 2012 within the three linguistic regions (lines) and how many news sites combined make up this coverage rate (columns). All information outlets covering at least 0.5% of the population in the linguistic region are taken into account.
Interpretation example: The coverage rate in French-speaking Switzerland increased from 4.8% to 6.7% between 2010 and 2012, while the number of information outlets remained unchanged at four.

ing Switzerland is down to *Blick.ch* alone (17% market share), with around two thirds of that of *Tamedia AG* in German-speaking Switzerland being down to *20minuten.ch* (15% market share) and more than a third of its position in French-speaking Switzerland being down to *20minutes.ch* (12% market share).
The effects of concentration can also be seen in private television featuring information-based journalism, which is not only competing for advertising with public television, but also with the Swiss broadcasters with a purely entertainment-based offering (particularly *3+* and *4+*) and the very powerful private entertainment-based television from neighbouring countries speaking the same languages. In terms of private television featuring information-based journalism in German-speaking Switzerland, *AZ Medien AG* dominates, thanks to the news programmes on *Tele M1*, *Tele Bärn* and *Tele Züri*, where the focus is very much on soft news, making up 4% of the total 5% coverage rate for the various news offerings on private television.

1.3 Precarious financing situation for information-based journalism

An analysis of the financing of information-based journalism in Switzerland firstly reveals a decline in coverage for the traditional print, radio and television forms, with only the online sector enjoying a moderate increase. At the same time, the circulation for all the press outlets relevant from a recording perspective fell between 2011 and 2012 in French-speaking and German-speaking Switzerland (–3% in terms of circulation). Only Italian-speaking Switzerland saw the press increase its circulation thanks to *20 minuti* by a substantial 9.5%, with *20 minuti* gaining 11.5% while the other outlets lost 2%. In French-speaking Switzerland, the coverage rate for the subscription paper fell

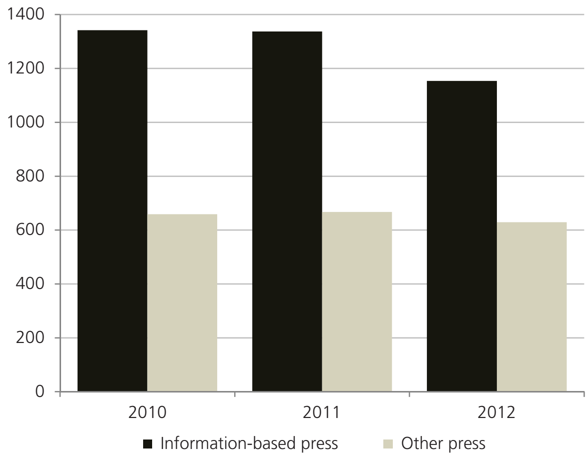

Diagram 11: Net advertising revenue for the press
The diagram shows the (net) advertising revenue per year between 2010 and 2012. The dark column shows the revenue for information outlets and the light column the revenue for other outlets in CHF millions (data set used: Werbestatistik Schweiz).
Interpretation example: Advertising revenue for the information-based press fell by CHF 183 million between 2011 (CHF 1,337 million) and 2012 (CHF 1,154 million).

Diagram 12: Gross advertising revenue for online offerings
The diagram shows the (gross) advertising revenue per year between 2010 and 2012. The dark column shows the revenue for information outlets and the light column the revenue for other outlets in CHF millions. Due to a lack of net figures, advertising revenue had to be calculated on the basis of gross advertising revenue (data set used: Mediafocus).
Interpretation example: In 2010, the gross advertising revenue for the news sites was CHF 79.5 million, while the gross advertising revenue for the other providers was CHF 364 million.

from 22% to 20% between 2010 and 2012, while that in German-speaking Switzerland fell from 22% to 18%. Online subscriptions are unable to compensate for this (see diagrams 9 and 10). The coverage rate for this media type increased between 2010 and 2012 from 4.8% to 6.7% in French-speaking Switzerland and from 5.8% to 8.1% in German-speaking Switzerland. In Italian-speaking Switzerland, the coverage enjoyed by online subscriptions for 2012 was 3.1%. From a broadcasting perspective, declining usage rates are particularly affecting public television in terms of information-based programmes, with the period between 2010 and 2012 seeing a fall from 62% to 59% in French-speaking Switzerland, from 71% to 66% in German-speaking Switzerland, and from 73% to 53% in Italian-speaking Switzerland.

In addition to public radio, which is losing rather less of its audience for its information offerings, the media types achieving the highest usage levels for information-based journalism are public television and subscription papers. Whereas public television has a stable revenue base thanks to licence income, the press continues to enjoy by far the greatest amount of revenue from sales and advertising, despite suffering the greatest fall in revenue levels. Between 2011 and 2012 alone advertising revenue for the information-based press fell by CHF 183 million, on top of the CHF 1 billion or so that the Swiss press had already lost overall since the start of the new millennium, with the subscription press also having to cope with loss of advertising revenue to the free press (see fög, 2012, p. 121f.; see diagram 11).

All this means that the financing of information-based journalism is mainly at risk in the subscription press and on its news sites, because refinancing via display advertising brings in a pittance.

The only figures available for advertising revenue on the Internet are gross figures, as well as being of a general nature only and not specific to information media. Guesswork is required to gauge the order of magnitude in which advertising revenue for online information media lies. The display advertising market, where the news sites generate the greater part of their advertising revenue, was worth CHF 170 million in 2012 (figures from Media Focus 2012). According to the 2012 PWC study entitled “Experience the Future of Media Today.

Swiss Entertainment and Media Outlook 2011–2015", however, the news sites only account for around 40–50% of display advertising. Assuming 50%, this would equate to an increase in the estimated gross revenue from display advertising enjoyed by the news sites between 2010 and 2012 from CHF 80 million to CHF 85 million, with the interim figure for 2011 standing at CHF 88 million. This means the news sites also experienced a loss of CHF 3 million in 2012 compared with 2011 (see diagram 12).
However, the sources of data available for an estimate of advertising and sales revenue for the online sector are inadequate. Despite differences in the measurement criteria (gross versus net advertising revenue) and a lack of data relating to online advertising revenue, it would be fair to say that, so far, all expectations regarding returns have wholly failed to be met. The reason for this is simple: online advertising is very cheap, with search engines generating the highest revenue levels (31% share for 2012 according to the online advertising statistics from Media Focus 2012), followed by providers of online classified advertisements like *Homegate*, *Jobwinner, NZZdomizil, Autoscout*, etc. (27% share for 2012). Display advertising only came third, with a 25% slice of the online advertising pie. The portals for classified advertisements represent a particular problem in terms of financing for information-based journalism. This is the original kind of advertising and the second-oldest form of press financing (following actual sales), whose revenue, now that the big publishing houses have bought up this business again (at great cost), is no longer benefiting information-based journalism (as is the case with *Tamedia AG*). This commercialisation of the media world is undermining its very *raison d'être*-journalism (see fög 2013, "Preamble"). The media companies dominating the market in the press and online sector are pursuing more and more strategies of diversification into fields outside the sector, such as event marketing, dating agencies, sports rights and celebrity marketing. They are also attempting in Switzerland to build up sophisticated advertising networks based on targeting. Across the board, all media forms are under pressure in the wake of structural changes to the media due to the high level of investment required to implement technological changes while revenue is falling. Revenue levels for private broadcasters remain low. The very survival of private television with an information offering depends on ongoing support from licence fees. In 2012, only the advertising slots of foreign TV providers managed to grow their gross and net revenue significantly. They increased their advertising revenue (gross figures) from CHF 739 million to CHF 832 million (12%) between 2011 and 2012. Particularly in terms of TV, it is clear that providers which focus on entertainment are benefiting the most from advertising revenue. Public broadcasters are also seeing a decline in television advertising. Television also faces the general threat of a further decline in advertising in future due to the increase in non-linear usage via "second screens" (PC, tablets, smartphones).
In a nutshell, the core issues for information-based journalism are inadequate and falling advertising revenue, belt-tightening measures, and the fact that news production in news rooms is becoming increasingly industrialised and digitalised within what is, particularly in the press and online sector, a highly concentrated media market. This media market is finding itself increasingly dominated by controlling parties whose profit-driven companies are diversifying into other lines of businesses and which are not prepared to cross-subsidise information-based journalism, even though it has always owed its existence to such arrangements.

2. Quality validation: less does not mean more

Given this diagnosis, what is remarkable is not so much the myth peddled, particularly by publishers but also by senior editors, of a newspaper scene in unprecedented fine form, but the fact that this myth is not being gainsaid by others within the sector and, if it is, then only "off the record". As was the case with the financial sector, criticism of the media sector is building from the outside. Again, like the financial sector, the media sector is attempting to immure itself against this criticism with the help of social partners (without contracts). This may be understandable in the short term, with the media also not being used to criticism. In the medium term, however, this smacks of ignorance and in the long term will prove fatal.
The level of ignorance which we have reached is proving an obstacle to debate within the sector, a debate which would raise the standards of information-based journalism once more and solicit pertinent suggestions for solutions. This debate is needed, since a fatalistic approach only brings the prospect of irreversible damage because the sector will then have changed so much that the already diminished professional standards of journalism – which underpin this Yearbook – will disintegrate further, with the profile of the profession becoming more blurred. Given the scale of the collateral damage to society of such a development, it is not as if these myths do not matter, since they act as a mental block undermining self-regulation. The downwards stratification affecting the media across the various linguistic regions – in other words, the erosion at the top sections of the pyramids and the segments below associated with medium-quality information-based journalism, together with the expansion of the bases of the pyramids associated with low-quality journalism – is about structures rigidifying. Free and tabloid forms of journalism have already become the mainstream in print and online, with quality standards being relativised to such a degree that statements from the Swiss Press Council are no longer published as a matter of course. If you dig beneath the internal standards of any profession, you will only find a kind of positive law. That said, there are no professions without their own professional standards. They would make the people involved equivalent to road users, who also only have to abide by positive law. There are therefore good reasons for debunking myths in order to lend validity to a more nuanced set of pictures.

2.1 Quality trends for 2010–2012

Our starting point is the area where the media crisis is being felt most acutely and the very *raison d'être* of information-based journalism: the provision of context. Compared with previous years, the quality analysis of the information media recorded in Switzerland shows that all the media types studied are, with two exceptions, providing less context (see diagram 13). The subscription press, free press, tabloid online and free online media types reduced the level of context they provided steadily between 2010 and 2012. The public radio and television and Sunday paper/magazine types saw a reduction from 2011 to 2012. Indeed, the reduction in the level of context provided by the public radio and Sunday paper/magazine media types was so pronounced between 2011 and 2012 that 2010's figures were also undershot. The only two exceptions were the subscription online and tabloid press types, the only areas seeing an improvement in the level of context provided between 2011 and 2012 (although not between 2010 and 2011).

Quality validation

The analysis of front pages and lead stories validated the 39 biggest media outlets from the press, radio, television and online forms in terms of the quality criteria of diversity, relevance, topicality and professionalism between 2010 and 2012. These outlets were selected from the 148 used for the analysis of media structures across the three linguistic regions – German-speaking, French-speaking and Italian-speaking Switzerland – on a pro rata basis based on the respective media types and their circulation within the four forms of information-based journalism. This sample selection from the

Diagram 13: Changes in quality 2010–2012 – provision of context

The diagram shows how the quality indicator associated with the provision of context has changed over time for each media type. The axis maps the deviation for the media type from the mean of all the media types studied, with the mean for the base year (2010) being used for the various annual measurements. This makes it possible to visualise changes in quality over the years in absolute terms. Data set used: All news stories from the analysis of front pages and lead stories that were sourced on the basis of random samples during 2010, 2011 and 2012 (2010 n = 14,387; 2011 n = 14,517; 2012 n = 15,570).

Interpretation example: Comparing the various types reveals that public radio provides the most context, showing above-average deviation from the mean for the various types. Between 2010 and 2011, public radio significantly increased the amount of context it provided. However, 2012 saw a fall-back to below the value for 2010 in this area.

quality analysis actually contains 47 media outlets. Given, however, that the broadcasting section of this Yearbook contains an extended (more outlets) quality analysis of private broadcasting outlets, the eight private broadcasting outlets are for once not included this year in the overall sample for quality analysis purposes.

A reduction in the level of context provided represents something of a problem in democracies, where the media are subject to well-justified and thus socially desirable expectations. Compared with 2010, the average level of context provided across the various media types has reduced by no less than 7%. Reporting has thus become much more episodic in nature and is providing less background information, as well as making fewer connections between cause and effect. This regression provides the clearest indication of the impact of the growing pressure to be topical and the lack of resources within information-based journalism. The only real improvement was in terms of rationality, which improved by an average of 3% across the types between 2010 and 2012. The relevance of reporting, i.e. the share of reporting dedicated to politics, business and culture (hard news), declined by an average of 2% across the various media types between 2011 and 2012, with soft news increasing accordingly. These fluctuations (relevance and soft news) observed between 2010 and 2012 are also, however, driven by events. Years involving (international) conflicts such as the Arab Spring, catastrophes (Fukushima) or the Swiss elections (as in 2011) are associated with a higher share of hard news, while those involving prominent sporting events like the Olympics or major football tournaments (as in 2012) tend to be associated with a higher share of soft news.

All media types with quality scores above the average for the various types (not including Subscription online) suffered a fall in quality compared with the previous year (see diagram 14). The quality level for public radio declined by no less than 6% between 2011 and 2012 (reduction in macro-level reporting and increasing privatisation), falling back to the level for 2010. Despite this decline, however, public radio still recorded the best results for 2012 if the various types are compared. As for the subscription press type, the reduction in quality between 2011 and 2012 has seen the

Diagram 14: Changes in quality 2010–2012

The diagram shows the changes in quality between 2010 and 2012 for each media type. The axis shows the deviation for the media type from the mean of all the media types studied, with the mean for the base year (2010) being used for the various annual measurements. This makes it possible to visualise changes in quality over the years in absolute terms. Data set used: All news stories from the analysis of front pages and lead stories that were sourced on the basis of random samples during 2010, 2011 and 2012 (2010 n = 14,387; 2011 n = 14,517; 2012 n = 15,570).
Interpretation example: Comparing the various types reveals that public radio provides the highest quality, showing above-average deviation from the mean for the various types. Between 2010 and 2011, public radio significantly increased its quality level. However, 2012 saw a fallback to the value for 2010 in this area.

quality level fall below that recorded for 2010. The increased share dedicated to soft news and, in particular, the lower values recorded in terms of the provision of context are having a negative effect. The public television and Sunday paper/magazine media types also saw their overall scores fall between 2011 and 2012, although these remain slightly above the 2010 level. The reduction in quality for both types compared with the previous year is mainly a result of less context being provided. The subscription online type may have enjoyed a slight improvement between 2011 and 2012, although it still trails its print-based equivalent by some distance. The overall score also remains below the value for 2010. The main factors behind the slight increase between 2011 and 2012 are the expansion of relevant reporting at a macrolevel and, bucking the general trend, a slight improvement in terms of providing context.

The biggest deterioration across the various media types for the period between 2011 and 2012 was recorded for free online (8% reduction in the quality score). There has been a continuous deterioration in quality since 2010. It seems clear that *20minuten.ch* is experiencing a dip in quality as a result of the proposed paywall at *tagesanzeiger.ch*. The free paper *20 Minuten* is also suffering from a considerable loss of quality (5% reduction in the quality score). The key factors for both outlets are the significant increase in the share of soft news and the reduction in the level of context provided. By contrast, the tabloid papers have shown a continuous improvement since 2010, i.e. including between 2011 and 2012. A year-on-year comparison shows a significant 10% increase in the quality score. The improvement could be seen in the tabloid outlets examined in both German-speaking *(Blick, Sonntagsblick)* and French-speaking Switzerland *(Le Matin, Le Matin Dimanche)*. This performance has seen them overtake the free papers and free online offerings between 2011 and 2012. This success can be attributed to provision of better context and a toning down of the moralising-emotive reporting style.

The tabloid online media type was again the undisputed worst performer among all the media types examined in 2012. The quality score may have shown a slight improvement between 2011 and 2012, but it re-

mains below the level for 2010. In light of this, it is impossible to envisage a successful paywall which does not offer additional, exclusive services.
The in-depth analysis of private broadcasters shows that their information-based output again remained at a modest level during 2012. This is not just due to revenue, but also because many private providers are simply not very inclined to offer professional information-based journalism. This is shown by both the findings from OFCOM programme research and our analysis of news programmes on private radio and television. The differences in quality between the individual private broadcasters remain significant. The quality deficiencies associated with the three television channels of *AZ Medien AG* are a striking example in this regard: the concession-holding *Tele M1*, out in front in this respect, broadcasts a total of only 10 minutes of hard news a day (not including repeats) during prime time and dedicates only 41% of the lead stories in its news programme to hard news, while the private Geneva-based television company *Léman Bleu*, which also holds a concession and is (still) partly controlled by the public sector, broadcasts around 35 minutes of hard news a day and dedicates a healthy 87% of its news programme to hard news. The differences in terms of hard news programming, which are significant in some respects, cannot really be attributed to the different levels of resources available to the individual private broadcasters.

2.2 The media worlds in 2012: war, bilateral issues, the Hildebrand affair, naked women, sport and even more sport

The focus here is on both the media agenda in Switzerland as a whole and the media agendas within the three linguistic regions. A comparison of these agendas makes it possible to establish the scope of the overall coverage, i.e. the coverage across the various linguistic regions. However, since media usage is determined by the group or class to which a person belongs (such as their level of education) as well as by their linguistic region, the question as to which media types reflect which particular features in their agendas is also of interest (see diagram 15).
Following the dominance of the media agenda during 2011 by crises and upheavals, the focus during 2012 was on disputes involving bilateral issues and domestic politics. At the same time, however, the agenda has also become more influenced by soft news compared with the previous year, matching 2010's figures. The convergence of news agendas seen in 2011 due to the various crises and upheavals tailed off again during 2012. As a result, the different levels of emphasis given to various topics across the media were again more strongly in evidence. The quality of public communication in a multilingual country like Switzerland – whose political system is built on direct democracy and federal structures – relies on a broad coverage of political, business and cultural topics that transcends the borders of linguistic regions. In 2012, the media types in the top section and middle segment of the pyramid, i.e. elements of the subscription press, public radio and public television, did the most to increase the focus on domestic political topics. Public radio in particular complements the reporting of domestic politics by devoting considerable resources to monitoring political and economic events on the international stage. It is not surprising therefore that public radio – as in previous years – dedicates the biggest share of its topical agenda to hard news. The second-best score in terms of topical relevance, i.e. the percentage of the agenda devoted to hard news, was achieved by public television. That said, public television is associated with a much higher turnover of topics than public radio. Users of public media and the subscription press are being presented with a news agenda which not only dovetails with the other linguistic regions in each case but also expands on Switzerland's relationships with the wider world and problems on a global political level.
In 2012, the high-quality representatives of information-based journalism in Switzerland brought to life a world marked by the civil war in Syria, the financial and political crisis within the EU and two presidential elections (USA and France) (see diagram 16). Secondary priority was accorded to the agenda for disputes involving Switzerland's bilateral relations with the wider world: the multi-layered problems concerning banking secrecy, the final withholding tax to regularise past tax bills and the disputes with the USA over untaxed assets. In terms of domestic politics and in addition to the bilateral issues referred to above, these media show Switzerland occupied with the Hildebrand affair, the country's energy policy following Fukushima, and its healthcare reform.

Press		Soft news
EU debt crisis	11.4%	1%
Civil war in Syria	8.7%	2%
Tax agreement with Germany	6.6%	2%
Blick Girls/Star	6.0%	100%
US presidential election	5.9%	2%
Hildebrand affair	5.8%	8%
Asylum Act/asylum in practice	5.7%	5%
KVG health reform	5.4%	1%
Euro 2012 football championships	5.2%	96%
Olympic Games in London	5.2%	94%
Banking secrecy under pressure	4.9%	1%
Swiss/US tax scandal	4.2%	3%
Swiss energy policy	4.1%	1%
French presidential election	3.9%	1%
Second residence initiative	3.6%	2%
Procurement of Gripen planes	3.5%	1%
Middle East conflict	2.6%	1%
State of Swiss economy	2.4%	1%
Football World Cup 2014	2.4%	98%
Football championship 2012/13	2.4%	100%
Average soft news share		**26%**

Public television		Soft news
Civil war in Syria	14.6%	4%
US presidential election	10.1%	5%
Tax agreement with Germany	7.1%	1%
Hildebrand affair	6.8%	8%
EU debt crisis	6.6%	1%
French presidential election	6.2%	2%
Asylum Act/asylum in practice	5.6%	3%
Second residence initiative	5.1%	2%
KVG health reform	4.6%	0%
Olympic Games in London	3.8%	87%
Procurement of Gripen planes	3.7%	3%
Swiss energy policy	3.7%	0%
Swiss/US tax scandal	3.6%	0%
Middle East conflict	3.2%	0%
Costa Concordia grounding	2.9%	83%
Car crash in the Valais	2.8%	84%
Banking secrecy under pressure	2.7%	0%
Cold snap during winter 2012	2.7%	80%
Euro 2012 football championships	2.2%	89%
Morsi regime in Egypt	2.1%	0%
Average soft news share		**23%**

Public radio		Soft news
Civil war in Syria	21.0%	1%
EU debt crisis	13.0%	1%
US presidential election	7,.8%	4%
Tax agreement with Germany	5.6%	1%
French presidential election	4.9%	0%
Swiss energy policy	4.6%	1%
Asylum Act/asylum in practice	4.4%	4%
Middle East conflict	4.2%	2%
State of Swiss economy	3.8%	0%
Hildebrand affair	3.7%	7%
KVG health reform	3.6%	2%
Morsi regime in Egypt	3.5%	4%
Swiss/US tax scandal	3.2%	2%
Revolution in Egypt	2.9%	4%
Second residence initiative	2.9%	0%
Procurement of Gripen planes	2.3%	0%
Olympic Games in London	2.2%	100%
UBS: crisis management	2.2%	0%
Greek general election	2.1%	0%
Banking secrecy under pressure	1.9%	0%
Average soft news share		**7%**

Online		Soft news
Civil war in Syria	13.4%	3%
Olympic Games in London	7.8%	92%
EU debt crisis	7.4%	2%
French presidential election	7.1%	12%
US presidential election	6.3%	2%
Tax agreement with Germany	5.4%	1%
Hildebrand affair	5.4%	14%
Ski World Cup 2011/12	5.2%	100%
Procurement of Gripen planes	4.2%	0%
Euro 2012 football championships	4.0%	85%
Costa Concordia grounding	3.9%	84%
Attack on Jewish school in Toulouse	3.8%	73%
Car crash in the Valais	3.7%	86%
Apple: business development	3.6%	4%
Breivik process	3.5%	84%
Football championship 2012/13	3.3%	100%
Formula 1: 2012 season	3.3%	96%
Cold snap during winter 2012	3.2%	95%
Asylum Act/asylum in practice	2.8%	4%
Facebook: business development	2.7%	9%
Average soft news share		**47%**

Diagram 15: Agendas specific to the media forms and types in Switzerland

The tables show the 20 biggest communication events (CEs) for the press and online media forms and for public television and radio. Those CEs which only feature in the top 20 for a single form or type have been highlighted. The share of soft news reporting for the relevant CE is also shown as a percentage. The tables are based on all news stories about the top 20 CEs from the analysis of front pages and lead stories for the two media forms and the respective type between 1 January and 31 December 2012 (press n = 4,761; online n = 2,897; public television n = 2,030; public radio n = 1,563). *Interpretation example:* For the press media form, the EU debt crisis as a communication event received the greatest amount of coverage (position 1). 11.4% of the reporting on the top 20 CEs was devoted to this CE. The soft news content for this event was 1% in terms of press front pages.

Agenda for high-quality media		Soft news
Civil war in Syria	23.7%	2%
EU debt crisis	20.9%	1%
US presidential election	11.2%	1%
Tax agreement with Germany	8.4%	2%
French presidential election	6.3%	0%
Hildebrand affair	6.3%	5%
Swiss/US tax scandal	6.0%	4%
Swiss energy policy	5.9%	2%
Banking secrecy under pressure	5.9%	0%
KVG health reform	5.4%	7%
Average soft news share		**2%**

Agenda for low-quality media		Soft news
Olympic Games in London	13.8%	93%
Blick Girls/Star	13.7%	100%
Civil war in Syria	12.4%	3%
French presidential election	10.8%	11%
Hildebrand affair	9.3%	15%
Tax agreement with Germany	8.9%	2%
Euro 2012 football championships	8.3%	92%
Asylum Act/asylum in practice	8.1%	4%
EU debt crisis	7.4%	3%
Ski World Cup 2011/12	7.3%	100%
Average soft news share		**42%**

Diagram 16: Agendas associated with high-quality and low-quality media
The tables show the ten biggest communication events (CEs) for all those media outlets belonging to the highest (left) and lowest (right) quality segment (see diagram 2). Those CEs which only make the top ten on one agenda have been highlighted. The tables are based on all news stories about the top ten CEs from the analysis of front pages and lead stories between 1 January and 31 December 2012 (n = 3,964).
Interpretation example: On the agenda of the highest-quality media outlets, the civil war in Syria as a communication event received the greatest amount of coverage (position 1); 23.7% of the reporting on the top ten CEs was devoted to this CE. The soft news content for this event was 2%.

By contrast, the world presented to users of the lowest-quality media was all about the Olympics in London and scantily clad young women enjoying a day's stardom (as "*Blick* Girls"), followed by the civil war in Syria (war always features across all the various media types) and the presidential election in France. "Domestic politics" on this agenda was limited to debates, predominantly socio-moral in tone, about the Hildebrand affair and asylum policy. The bilateral issues involving Switzerland were only really given any prominence in terms of the arguments about the final withholding tax. The EU debt crisis was ranked much lower than it was on the agenda for the high-quality media, sandwiched between two sporting events (the European football championships and the Ski World Cup). Users who receive all or most of their information from these media are presented with a world dominated by soft news (sporting events and human interest stories). As far as the media associated with the online form are concerned, the soft news share given to the twenty communication events attracting the most attention was a substantial 47%. The free (61%) and tabloid (46%) press media types are also associated with a very high proportion of soft news. In addition, the tabloid papers and, to an even greater extent, the free papers have a very high turnover of topics. This means that events and topics deemed to be of relevance are followed up with much less continuity than in the media occupying the top section of the quality pyramid.
The greater focus on topics involving domestic politics means there was a greater overlap between the agendas of the linguistic regions than in the previous two years as far as hard news is concerned. This convergence of political, business and cultural topics helped promote integration within multilingual Switzerland during 2012.
Also, the year 2012 again revealed the different sensibilities within the linguistic regions. As in previous years, public communication within Italian-speaking Switzerland was dominated by concerns about the economy and to a much greater degree than in German-speaking or French-speaking Switzerland. This had tended to be rather more self-referential in previous years, but the only striking thing about it this time was the very high proportion of soft news. Public communication in German-speaking Switzerland continues to focus by far the most closely on treating foreigners as a problem.

3. In-depth studies: Switzerland is not alone, and journalism on Twitter serves to promote its own products

Further in-depth studies are again being produced this year. These will no longer be published in the Yearbook, but as separate studies available from Schwabe Publishers (www.schwabe.ch) and the fög (www.foeg.uzh.ch). The in-depth studies from the Yearbook for 2010, 2011 and 2012 are also available in this form.

Two in-depth studies are being published at the same time as this Yearbook.

The first of these is entitled "Kommerzialisierung und Konzentration der Medien im internationalen Vergleich" ("An international comparison of media commercialisation and concentration").

This looks at changes to media structures in five countries of Western Europe (Germany, France, the United Kingdom, Austria and Switzerland), focusing on the press, television and online media forms. As well as the tendency for media to move away from their original contexts and their orientation towards an entertainment and information market where the main consideration is to make a return, other issues of interest are the level of concentration within the media world and the downwards stratification of the public based on the usage of various media forms and types.

The results indicate that, in all the countries assessed, the commercialisation of the media is on the increase, particularly since the 1980s. This applies to the press, public broadcasters (introduction of a dual system) and the online sector, which is associated with a particularly powerful commercialisation dynamic. The focus is on the online sector because all the traditional media forms are converging on this platform and new players from outside the sector are making inroads into the online information market. In all the countries, commercially oriented telecommunications and software companies, search engine operators and social media companies, whose information offerings focus heavily on soft news, are competing with the online offerings from media publishing houses and (public) broadcasters.

In terms of media type usage, tabloid papers figure significantly and/or are gaining in significance in all the countries. This downwards stratification – apart from in Germany – has been accentuated during the last 15 years or so by free papers, whose media content is also associated with soft news. The same applies to the fast-growing online sector, with four of the five countries seeing usage of low-quality offerings increase compared with the press. The investigation shows that Switzerland is not alone, but that commercialisation and the process of concentration are particularly intense and accelerating greatly in this country.

The second study is entitled "Medien im Social Web – Journalistischer Mehrwert?" ("Media in the social web – added journalistic value?").

This study is looking at Twitter messages from media organisations and journalists. The areas of interest include the quality of the media news stories accessible via Twitter links, whether Twitter is compensating for the erosion of media criticism in the established information media and whether Twitter is living up to social media's claim to be truly "social", i.e. whether the opportunities for interaction are actually being used. To this end, the contents of active and widely followed Twitter accounts from Swiss media organisations and journalists were examined and their content analysed.

The results show that Twitter communication from editorial teams/media organisations is not delivering any noticeable added value in journalistic terms. Twitter is mainly used by editorial teams as a means of promoting their own stories. Editorial teams hardly ever make use of the possibilities to interact with other users, or only do so very sporadically. At this level, Twitter seems by and large to be about one-way communication to a mass audience and does not live up to social media's claims to promote interaction and discourse.

At the level of journalists' individual accounts, however, the positive effects in terms of quality are discernible: the most noticeable aspect of how journalists communicate via Twitter is their greater openness to the world around them. Reference is made to a wider range of sources and communication is more discursive. Journalists also use Twitter quite intensively as a means of debating and channelling issues relating to and critical of the media. This criticism of the media voiced on Twitter does suffer from some limitations, however, with people reluctant to criticise journalism from their own organisation. The reflection on problems within the field of information-based journalism is also being marginalised. Media criticism expressed on Twitter mainly takes the form of negative appraisals of others' media content and competing media outlets. The focus here is predominantly on individual cases. In addition, the media criticism expressed on Twitter has an extremely limited reach and does not diffuse into the information media.

The mark of the printing and publishing house Schwabe, founded in 1488, dates back to the very beginnings of the art of printing and derives from the circle of artists around Hans Holbein. It is the printer's mark of the Petris, and illustrates Jeremiah 23:29: "Is not my word like as a fire? saith the LORD; and like a hammer that breaketh the rock in pieces?"

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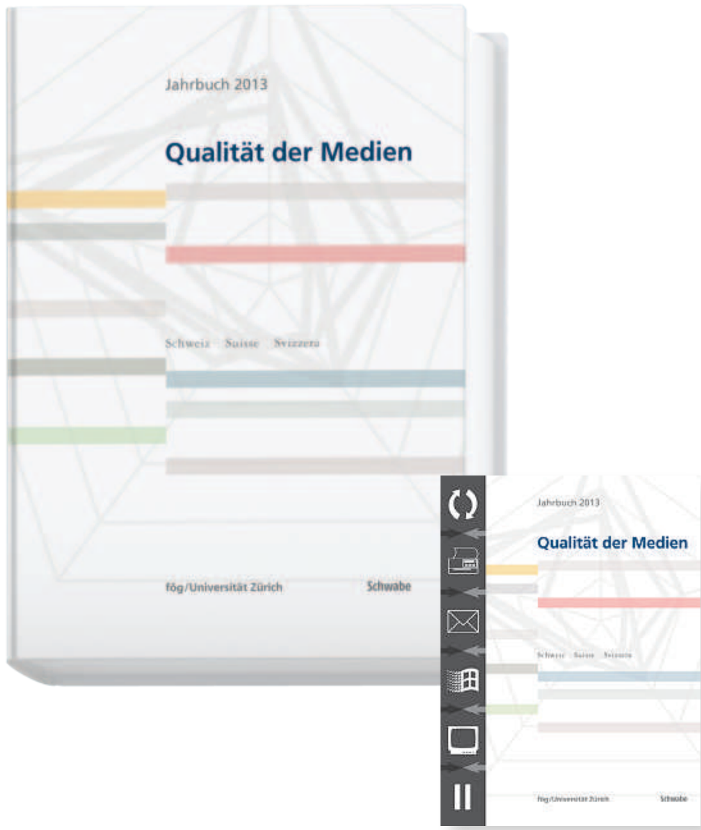

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Die in der letztjährigen Ausgabe festgehaltenen Konzentrationsprozesse und Einnahmeverluste stellen die Schweizer Medienlandschaft auch weiterhin vor grosse Herausforderungen. Die neue Ausgabe des Jahrbuchs Qualität der Medien setzt hier einen Schwerpunkt und untersucht die Folgen der Konzentrationsdynamik und des Ressourcenschwunds im Journalismus für die Qualität der Medienberichterstattung.

Die insbesondere im öffentlichen Rundfunk fortschreitende Konvergenz gibt Anlass, die Qualitätsverschiebungen in den Mediengattungen Radio und TV zusammen zu besprechen. Im Bereich des Privatrundfunks werden zusätzliche Programme in die Analyse miteinbezogen, um die Unterschiede in der privaten Radio- und TV-Landschaft detaillierter aufzeigen zu können.

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